SARS / NOTES

From My Grid:

1. Highlight the student’s row with a single click
2. With the row highlighted, select “Notepad” in the right column
3. To ADD a Note, select “Add”
4. Leave the Visibility field set to Local
5. Provide a Summary heading in the “Title” field
6. Write to your heart’s content in the “Notes” field
7. Click “ok” when finished
8. Then click “close” to leave the Notepad feature

From the Drop In (express) List:

1. Double click on the student, just as you usually do
2. Before you click “ok” to remove the student from the list, you can click on “Notepad” to review any Notes on the student.
3. You can also add notes after seeing the student by selecting Show All, finding the student on the list, double clicking on the student, selecting “Notepad”, and following steps #3 - #7 above.

- The above steps will result in a Note being added to the list of notes, by date, with the “Title” of the note appearing.
- Any counselor can read through any of the notes. Students have no access to these notes.
- Counselors can delete any notes that they have written; you cannot delete notes that other counselors have written.
- There is a narrow “Notes” column that appears on My Grid (looks like a little hand writing a note). When there are any notes to view for a particular student, you’ll see an indication in that column.